Lumenn AI BETA

Lumenn AI Beta Quick Start Guide

Your Step-by-Step Guide to Unlocking the Power of Generative BI

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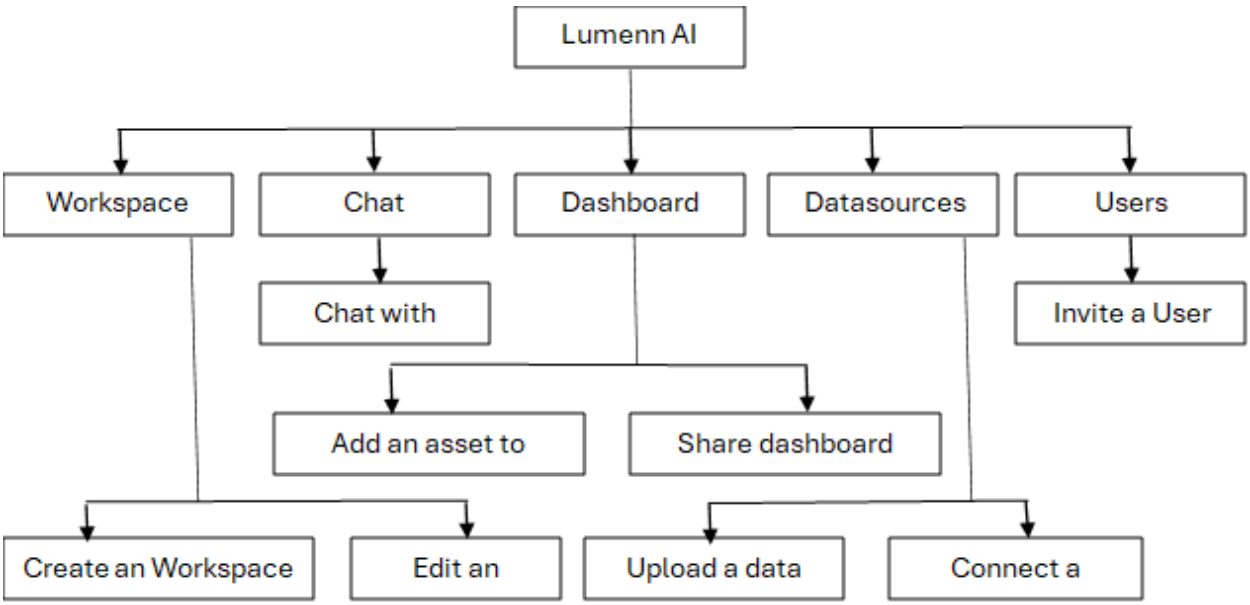
hello@lumenn.ai
www.lumenn.ai

Introduction

Lumenn AI is a generative BI (Business Intelligence) platform where users can perform BI analysis and generate reports and data visualizations from their enterprise data using natural language prompts.

This guide helps Lumenn AI users to set up and utilize various features and functions of Lumenn AI.

Architecture



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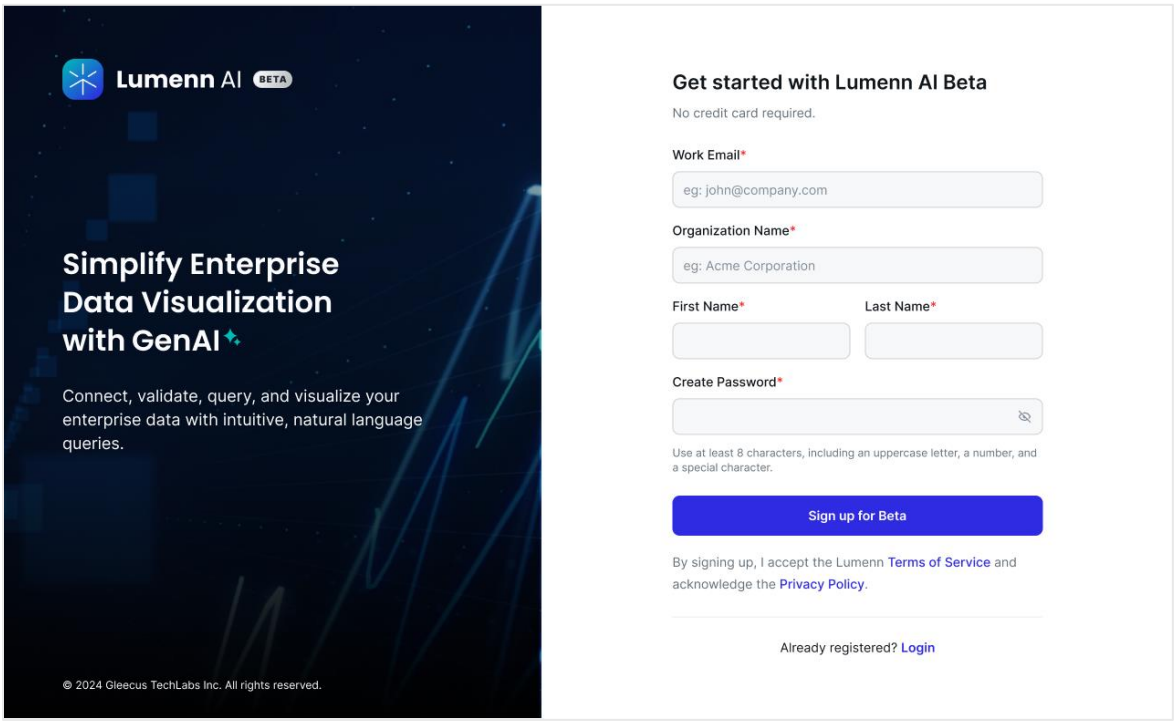
Creating a Lumenn AI Account

1. Navigate to app.lumenn.ai and click on '**Sign up for Beta'** button.

2. Fill out the sign-up form with the following fields:

   - **Work Email**: Enter a valid work email (e.g., john.doe@company.com).
   - **Organization Name**: Enter your organization's name (e.g., Acme Corp).
   - **First Name**: Enter your first name (e.g., John).
   - **Last Name**: Enter your last name (e.g., Doe).
   - **Create Password**: Create a secure password following the provided guidelines.



3. Click the **Sign Up for Beta** button. An email containing a **verification code** will be sent to your provided email address and you will be redirected to the verification screen.

4. Enter the **6 digit verification code** received on your email. Please check your spam or junk folder if no code was received. In that case click '**Resend code**' and new code will be sent.

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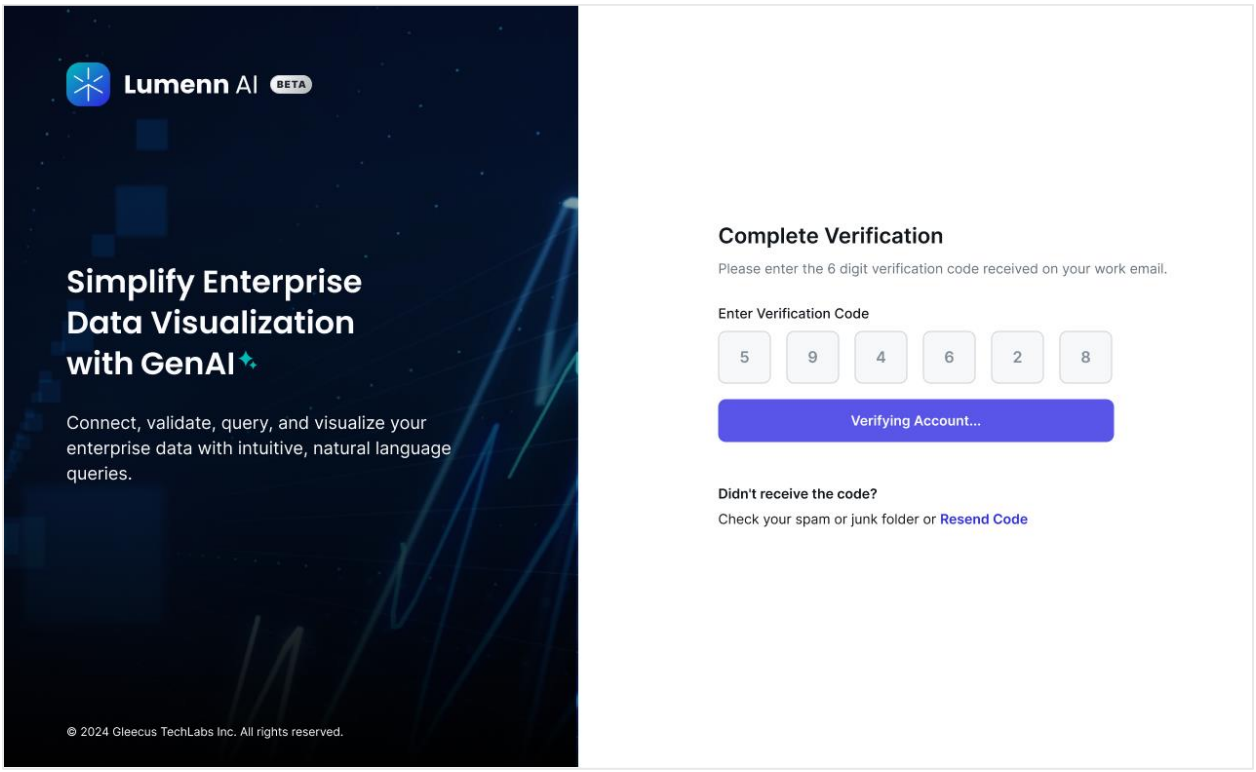
5. After entering the 6 digit code, click '**Verify Account**'.



ⓘ *Only one account per company domain is allowed. If an account is already created with an email like john@**acme.com**, other users with the same domain (e.g., jane@**acme.com**) will be prevented from creating an account.*

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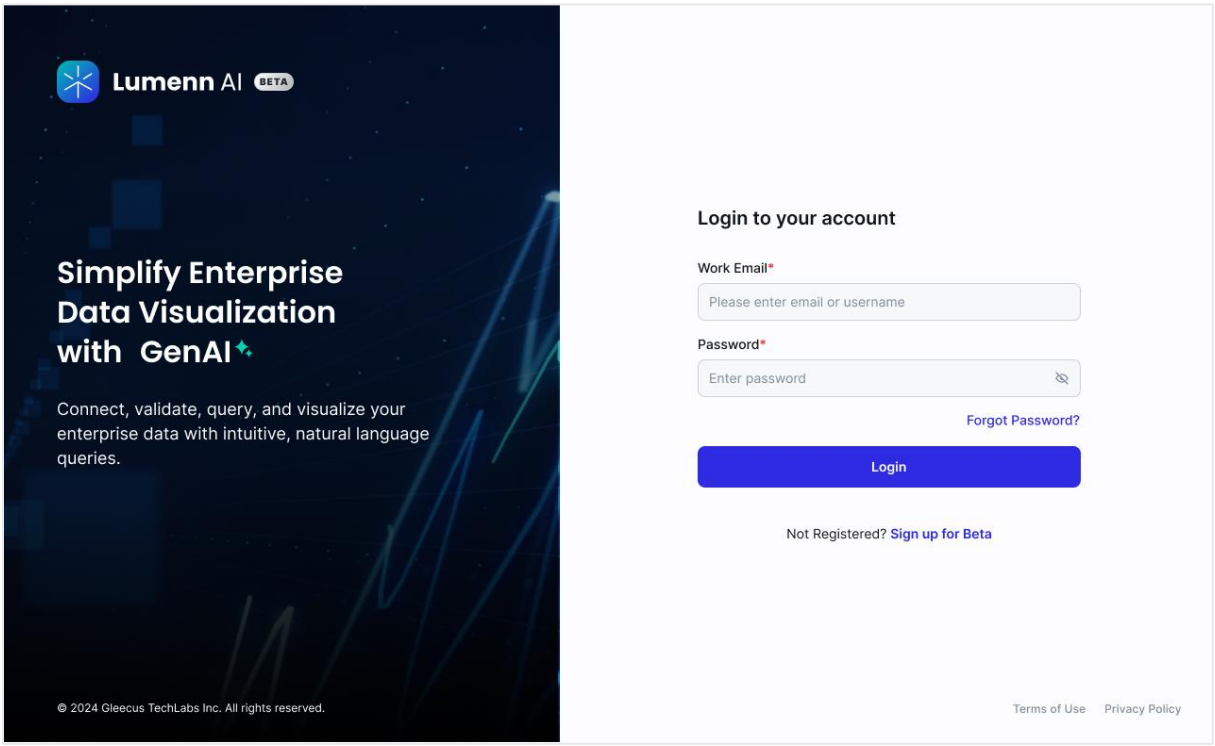
Logging into Lumenn AI

1. After successfully verifying your account, you will be redirected to the login screen. Alternatively, you can navigate to app.lumenn.ai to access the login page.

2. Enter the **email** and **password** and click **'login'** to proceed.



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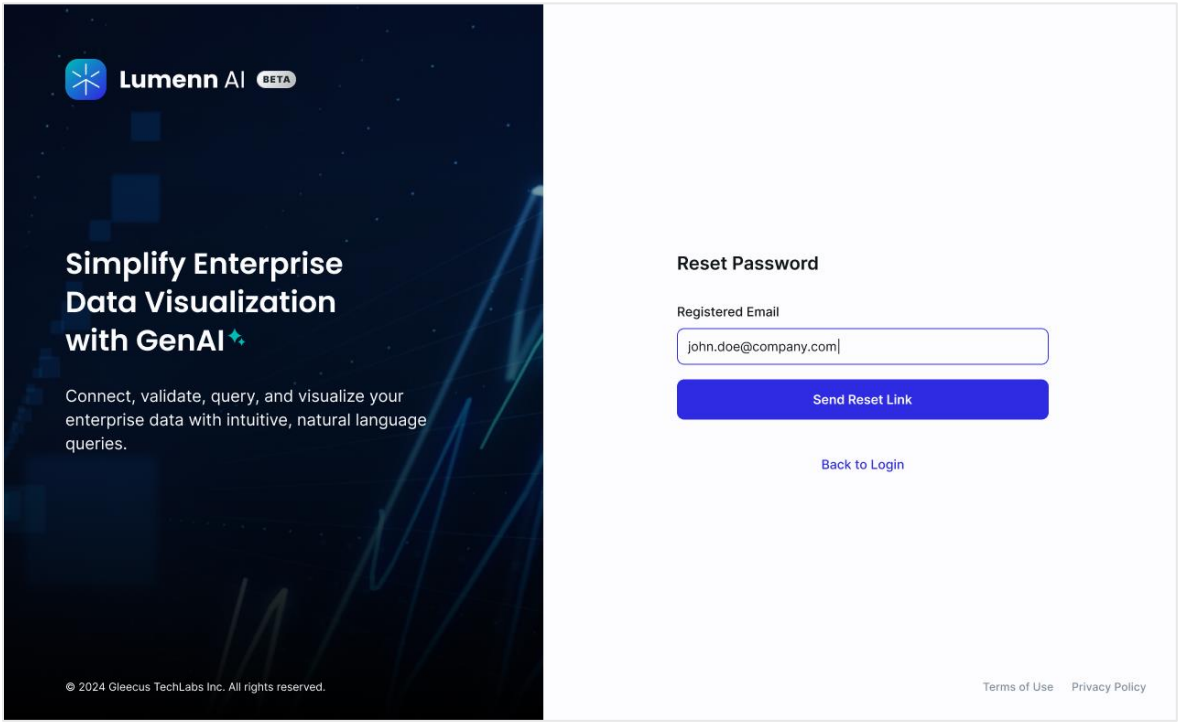
Forgot your Lumenn AI password?

1. Click '**Forgot Password?**' link. You'll be taken to **Reset password** screen.



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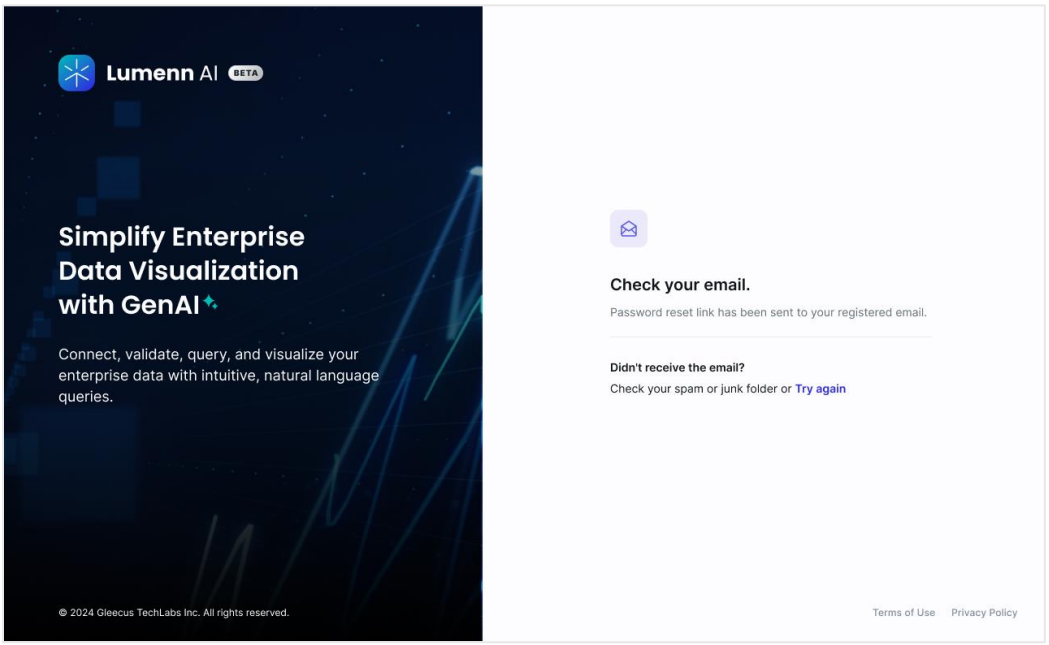
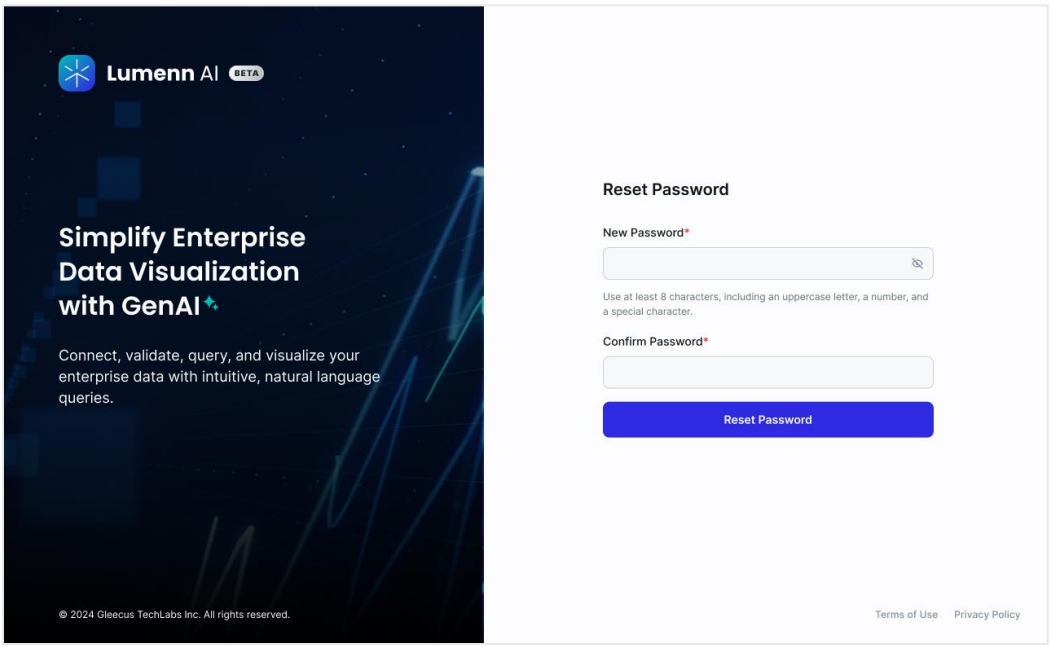
2. Enter your registered email and click '**Send Reset Link**'. A confirmation screen will notify you that the reset link has been sent to your email.



3. Click the **reset link** sent to your email. This will take you to the **Password Reset** page.



4. Enter your new password, confirm it, and then click '**Reset Password'**. You'll see a confirmation message that your password has been successfully reset.

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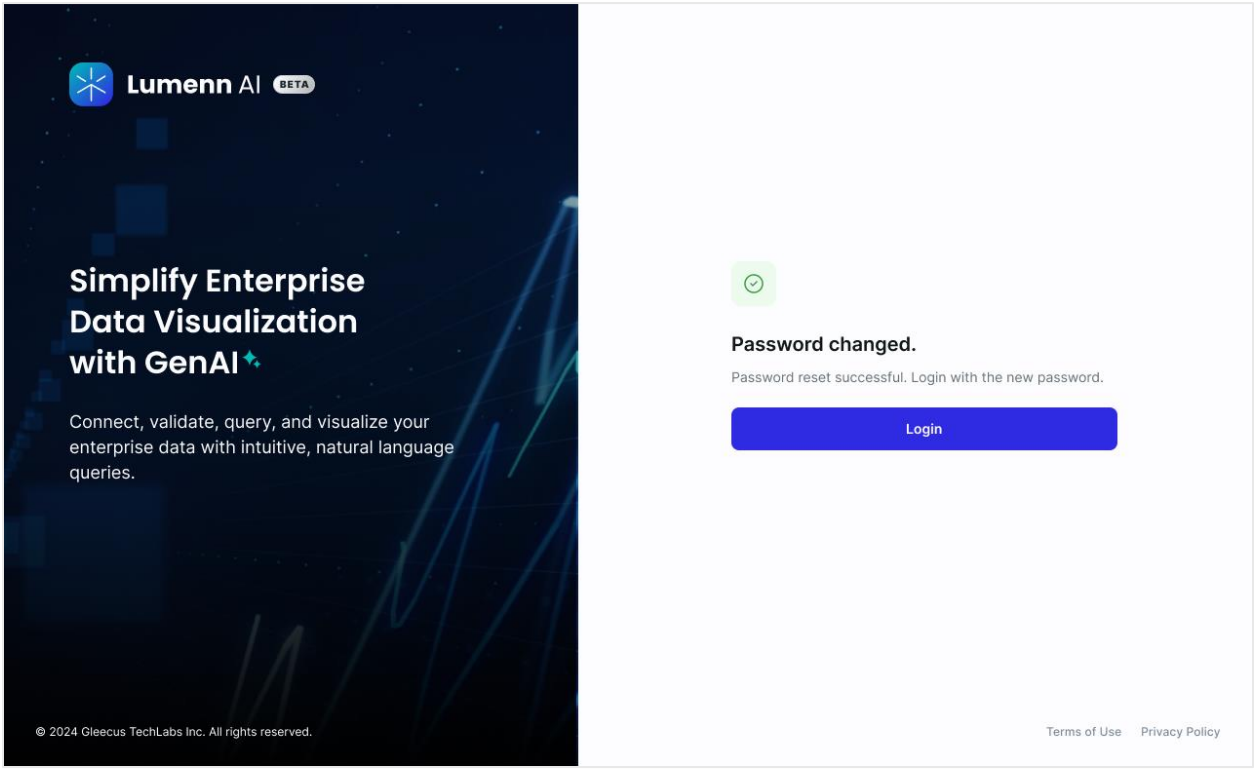

5. Click **Login** to return to the login page. Enter your **email** and new **password**, and you'll be logged into Lumenn AI.

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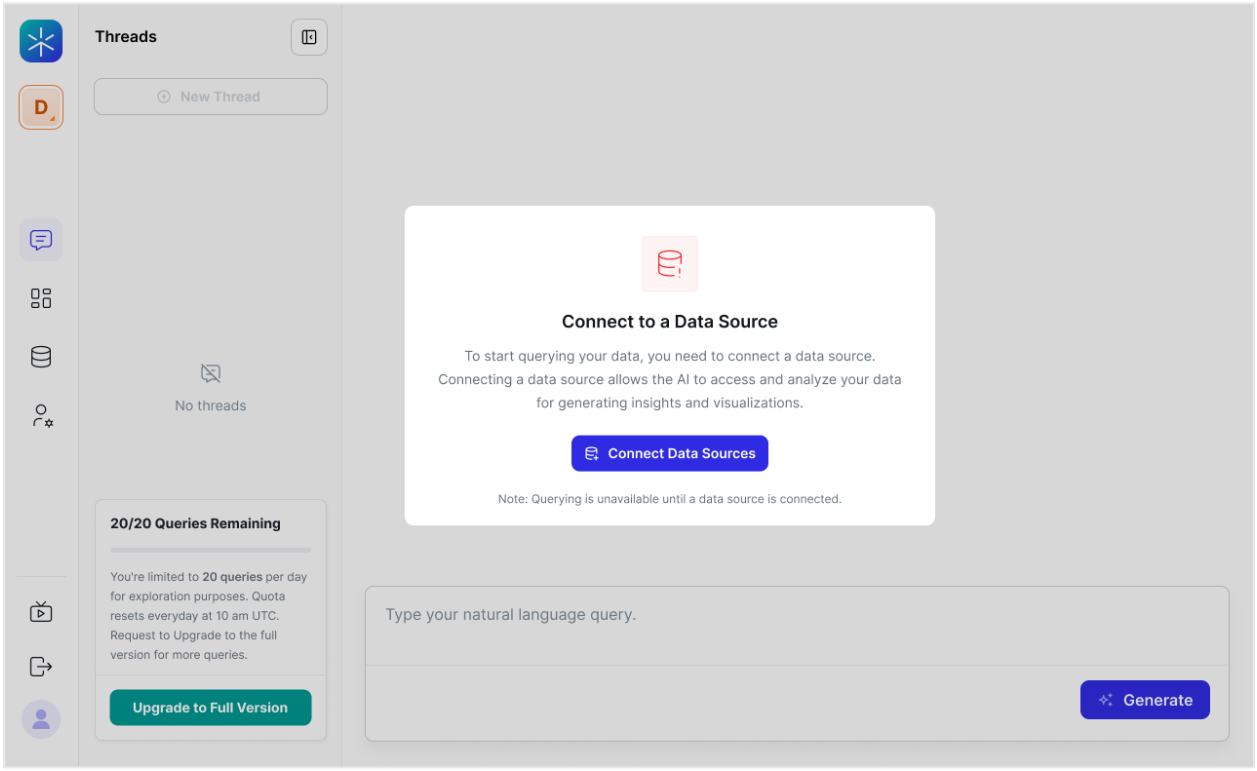
Setting up a Data Source in Lumenn AI

After logging in, you'll be greeted with a message informing you that no data source is currently connected. To start querying, you'll need to connect a data source.



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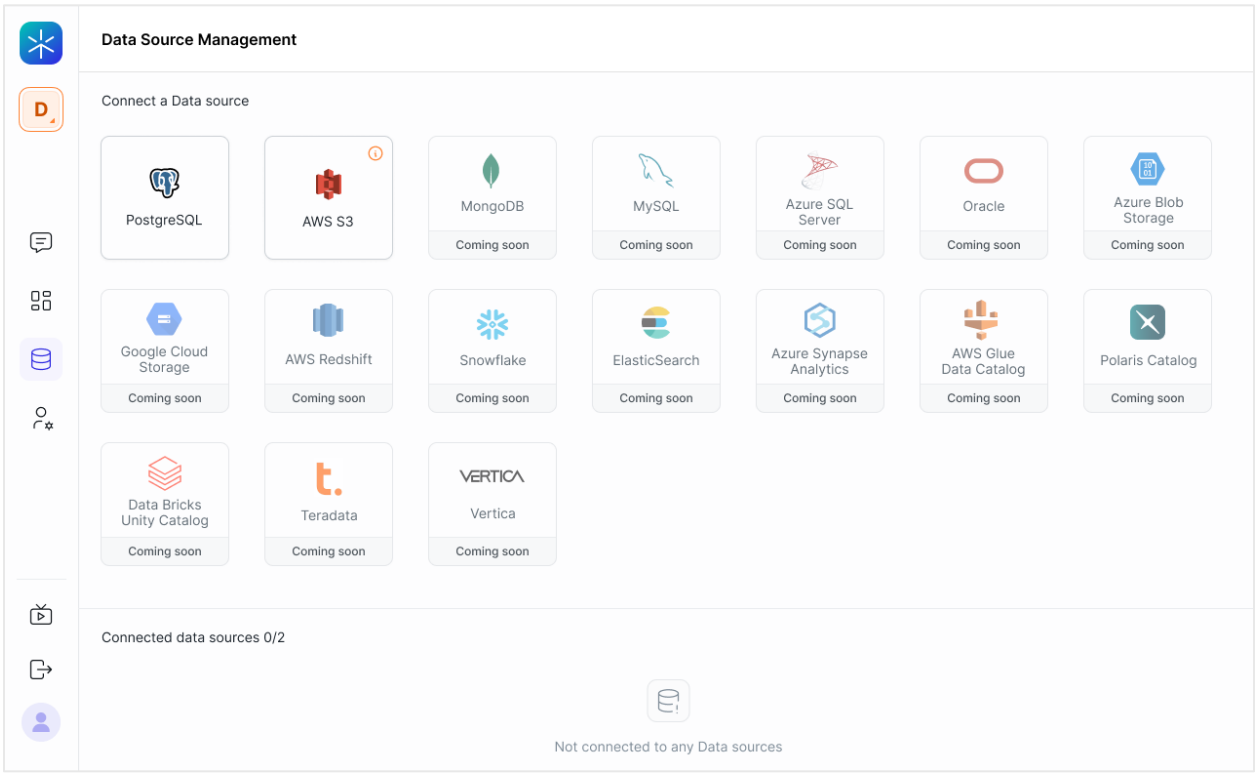
1. Click ‘**Connect Data Sources’** button to get started. You’ll be redirected to the Data Source Management screen.



Lumenn AI Beta allows you to connect **up to 2** data sources. Supported data sources are:

PostgreSQL

AWS S3.

Additional sources like MongoDB, MySQL, and others will be available in the full version.

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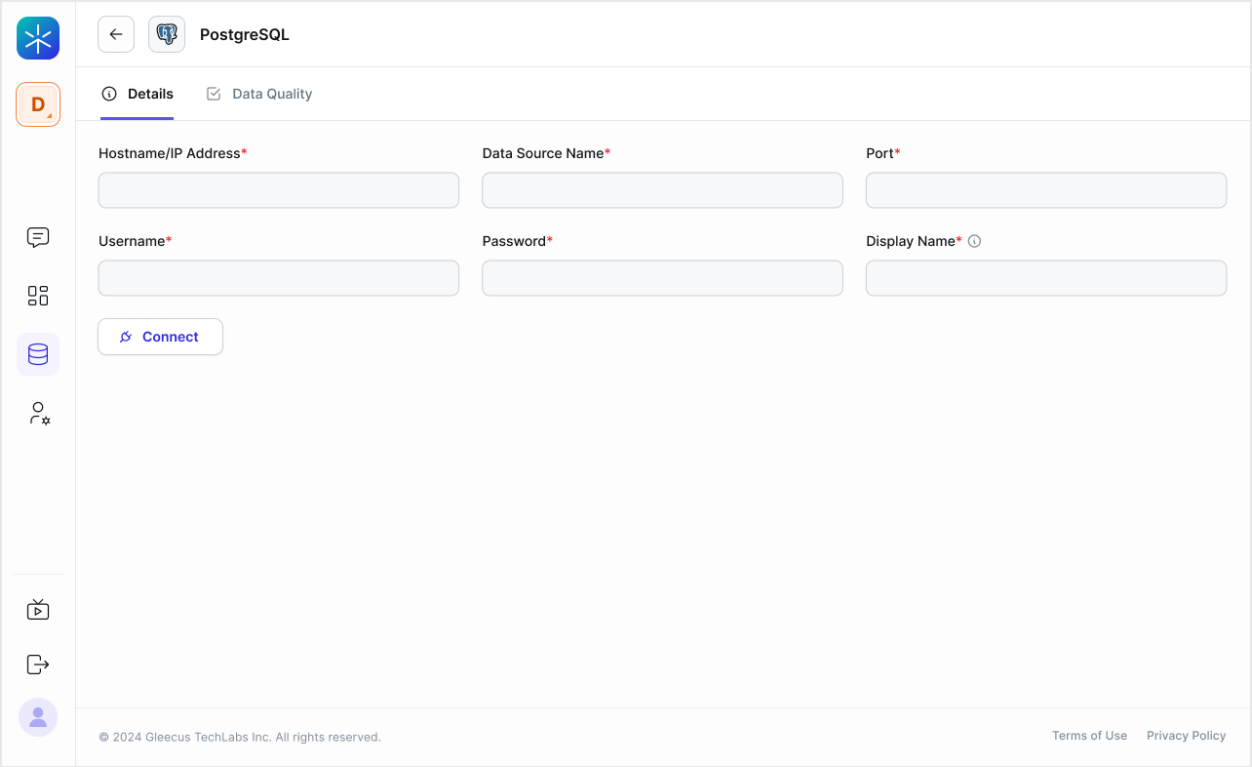
Connecting to a PostgreSQL Source

1. Click **PostgreSQL** card. This opens the PostgreSQL connection screen.

2. Fill in the required fields:

   - Hostname/IP Address
   - Data Source Name
   - Port
   - Username
   - Password
   - **Display Name***



* The **Display Name** is for recognition within Lumenn AI and can be anything you like. For example, if your data source contains healthcare data, you might name it **Healthcare Data** for easy identification.

3. Once the details are entered, click **Connect**. Below, you'll see a list of available tables from your data source.

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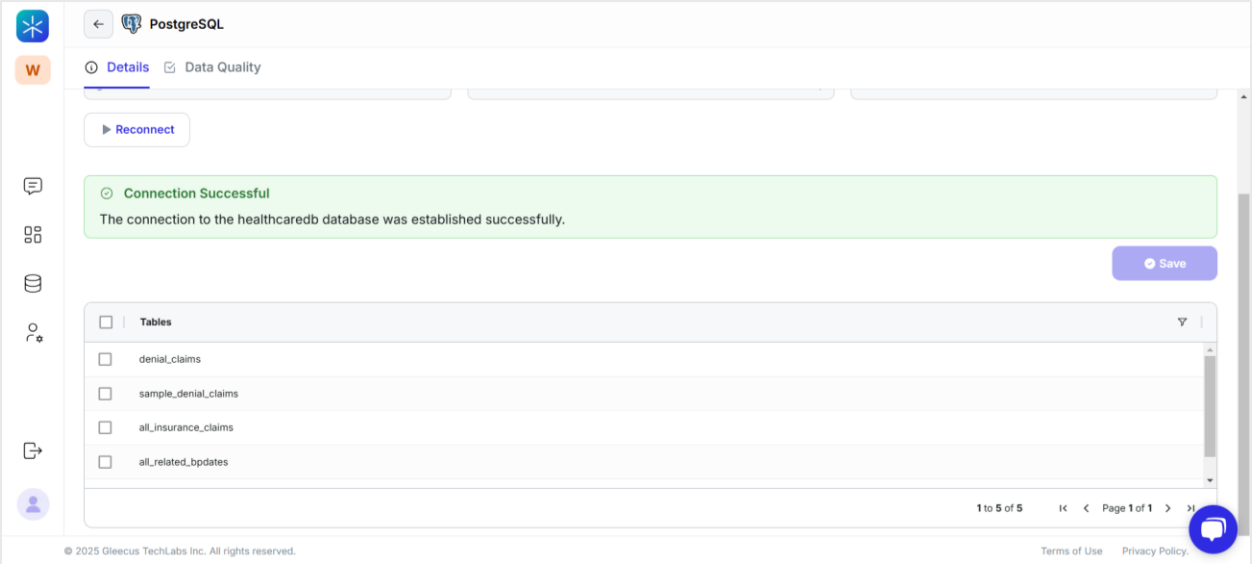
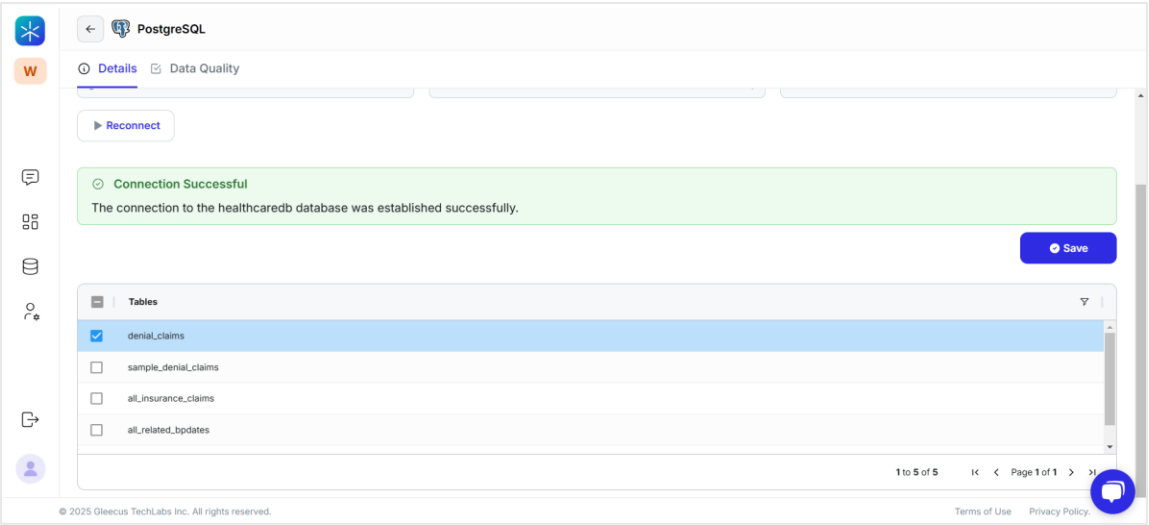


ⓘ It's important to note that Lumenn AI **doesn't copy your data**—it simply facilitates the connection. Your data remains secure and never leaves your environment.

4. Select the relevant tables you want to use and click **Save**.



5. You'll be redirected to the Data Sources screen, where you can now see your connected PostgreSQL source.

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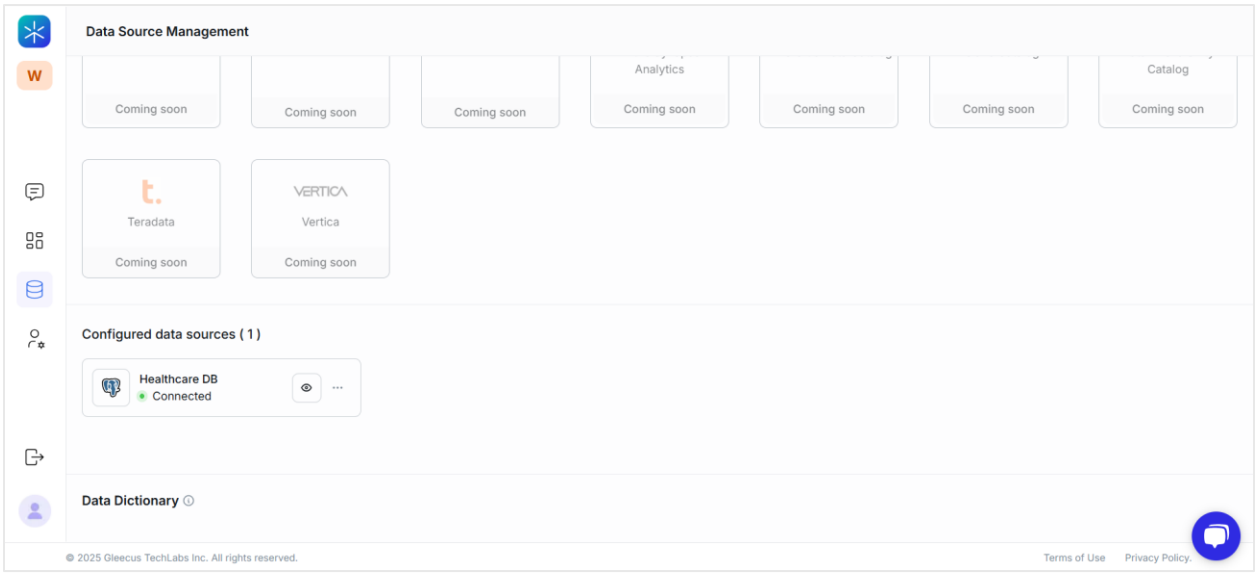

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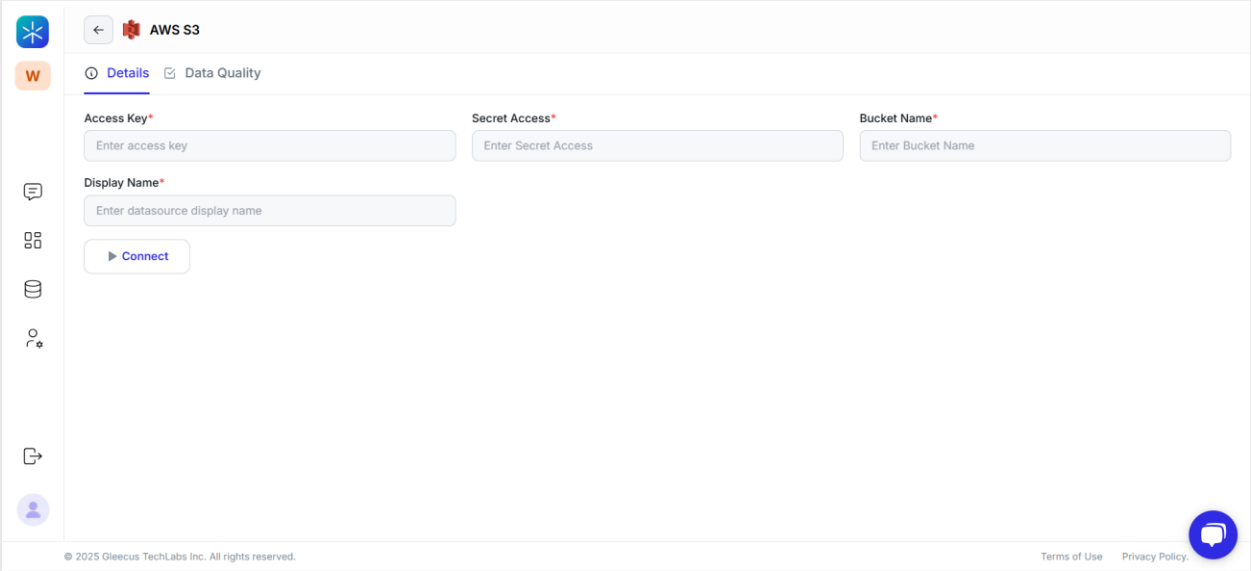
Connecting to an AWS S3 Source

1. Click **AWS S3** card. This opens the AWS S3 connection screen.

2. Fill in the required fields:

    - Access Key
    - Secret Key
    - Bucket Name
    - Display Name



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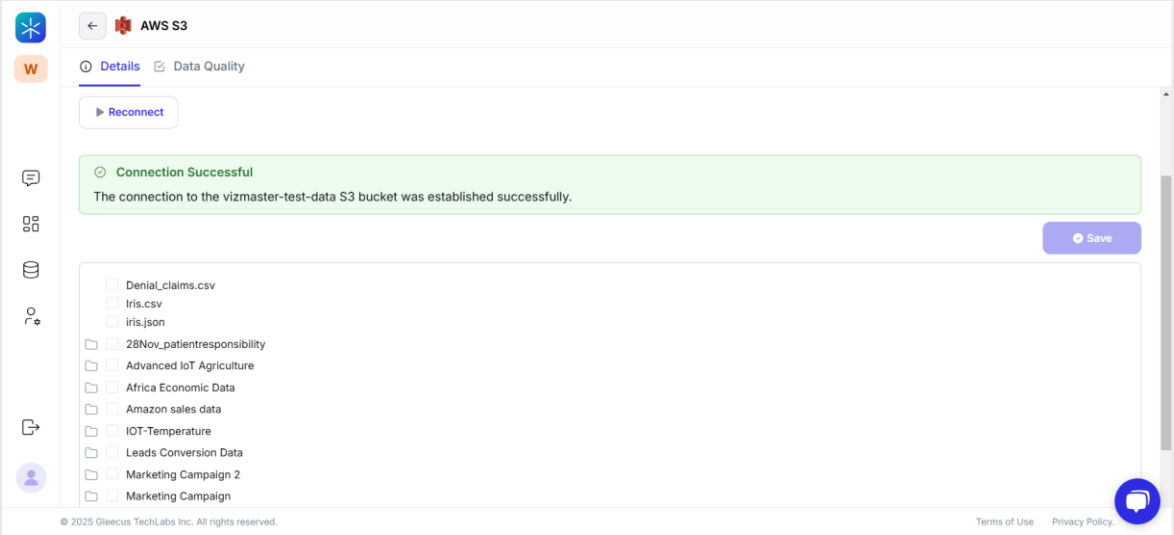
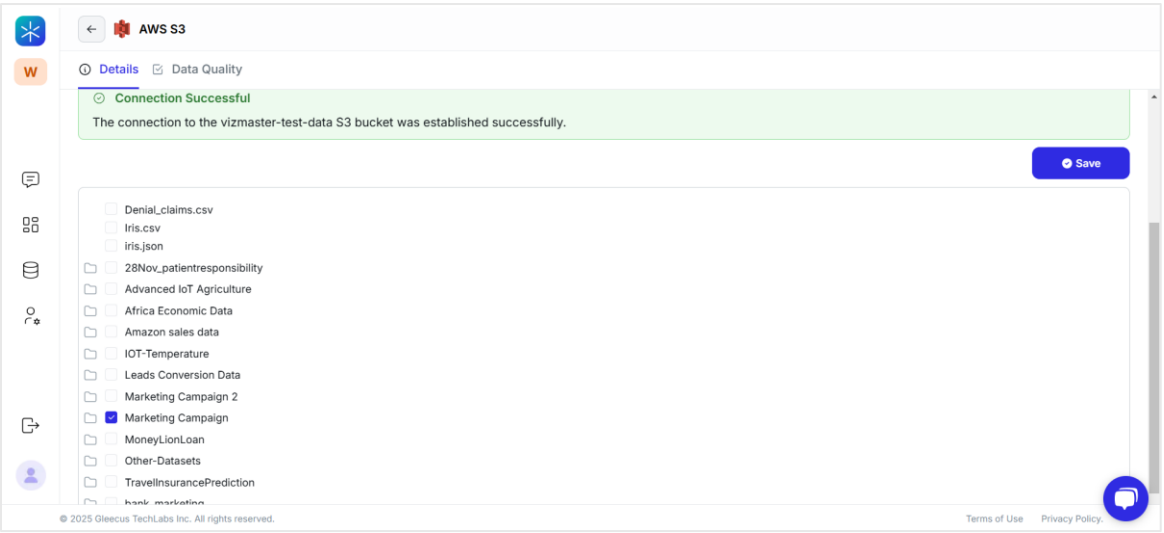
3. Click **Connect** to proceed. A list of files in your bucket will appear.



ⓘ In the beta version, Lumenn AI supports **CSV**, **XLS**, and **Parquet files**. Select only the supported and relevant files for your analysis.

4. Once you've made your selections, click **Save**.



5. You'll be redirected to the **Data Sources** screen, where your AWS S3 connection will be listed.

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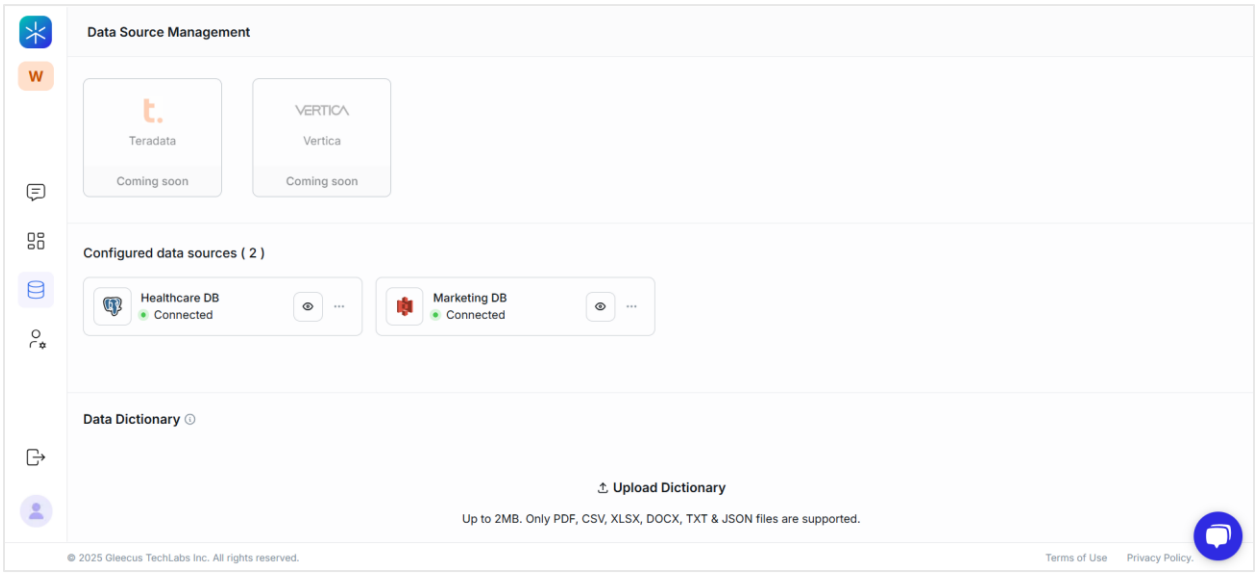

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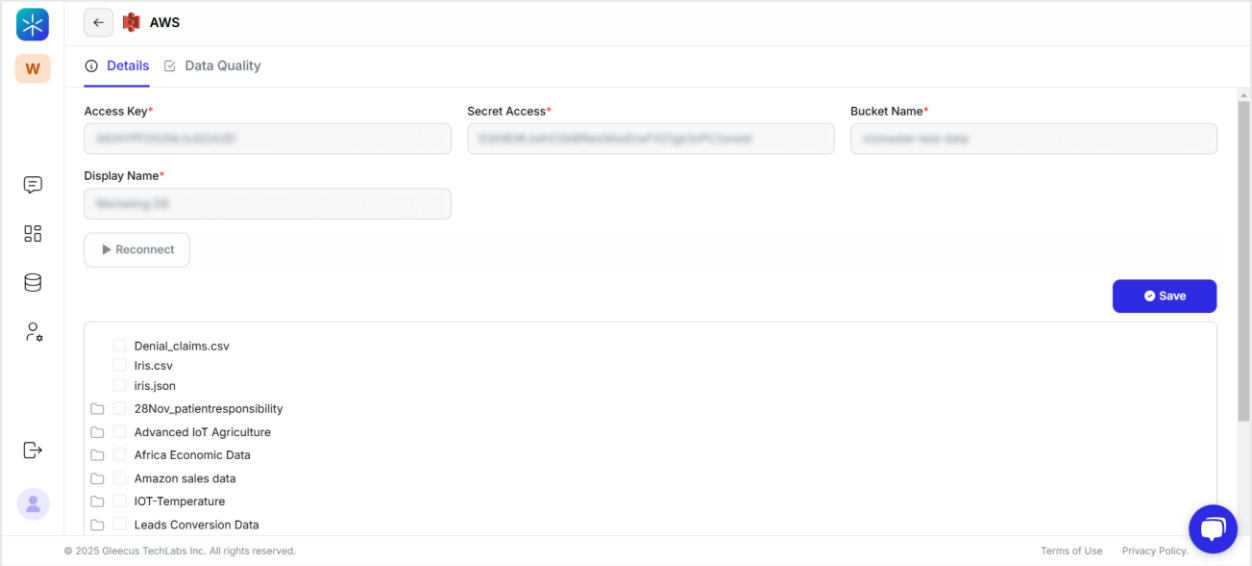
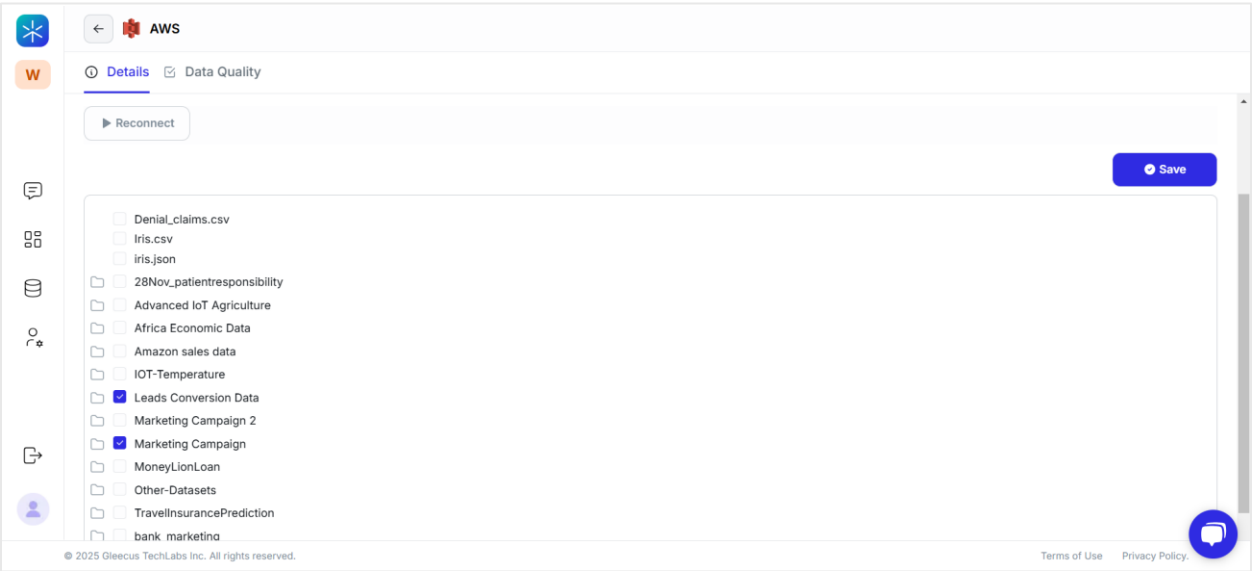
Updating a Data Source

If you need to add more files to your data source or update credentials, you can easily update the connected source in Lumenn AI.

1. Click on the **connected data source** you want to update. This will open the data source settings.



2. Make the necessary changes—whether it's updating credentials or making another file available for querying.



3. Once your changes are complete, click **Save**.

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4. Your data source will be updated, and you'll be redirected to the Data Sources screen, where the updated connection is reflected.

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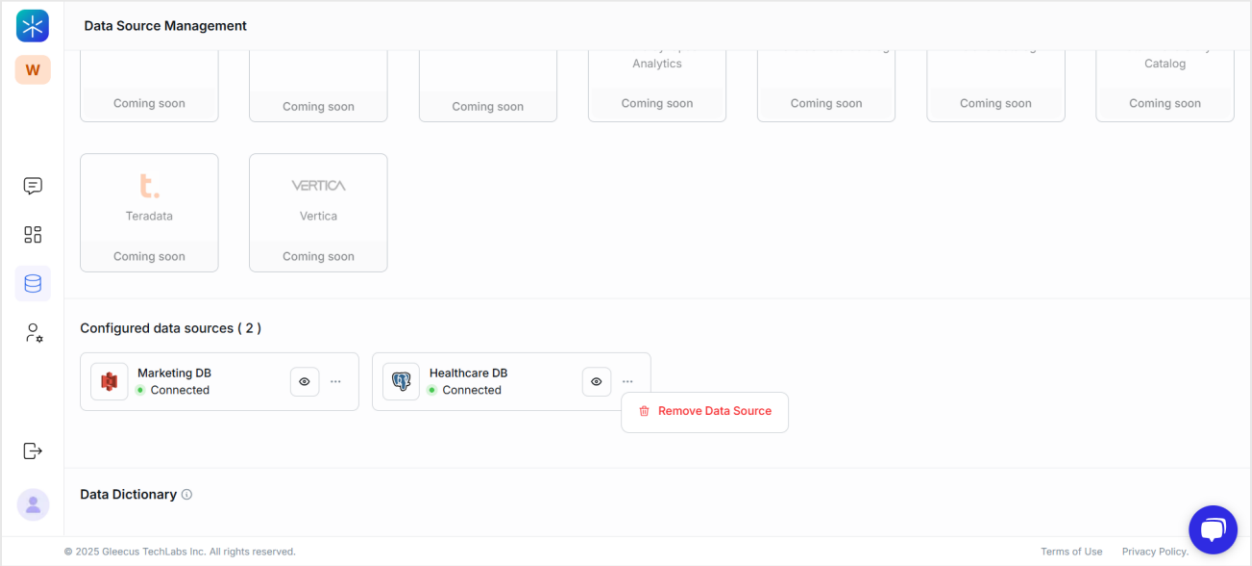
Removing a Data Source

1. Click the **three dots** icon on the connected data source card. From the menu, select **Remove Data Source**.



2. A caution message will appear, reminding you that once a data source is removed, you will no longer be able to query data from it.

3. Confirm the removal, and the data source will be removed from your list.

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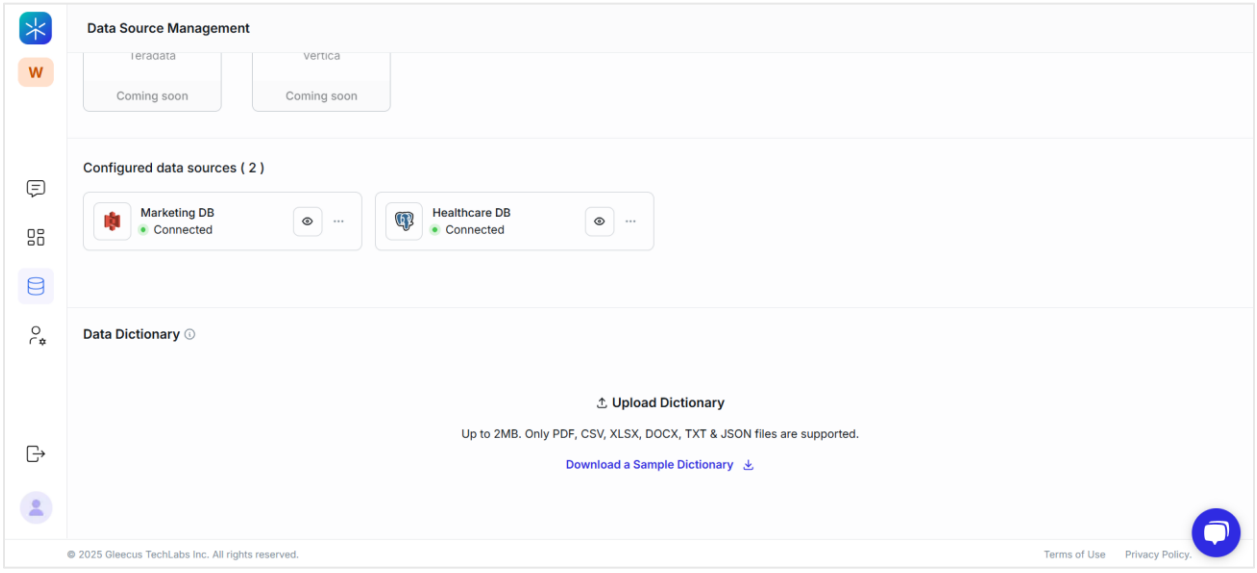
Uploading a Data Dictionary

This feature is only **enabled** once you've **connected to at least one data source**.

A **Data Dictionary** helps Lumenn AI understand your data structure, including table relationships, field definitions, and other key details. This enables more accurate and efficient querying.

ⓘ In Beta, you can upload **up to 2** dictionaries. To learn more about **creating a data dictionary**, download the Data Dictionary Guide, which includes detailed instructions.

1. Click the **Upload Dictionary** button.



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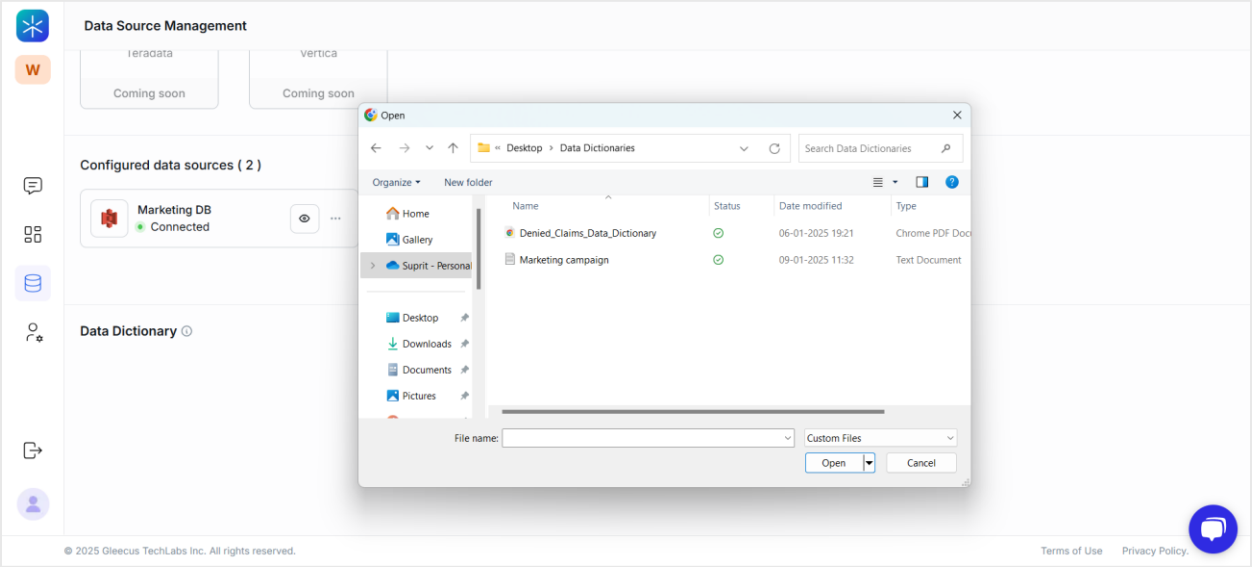
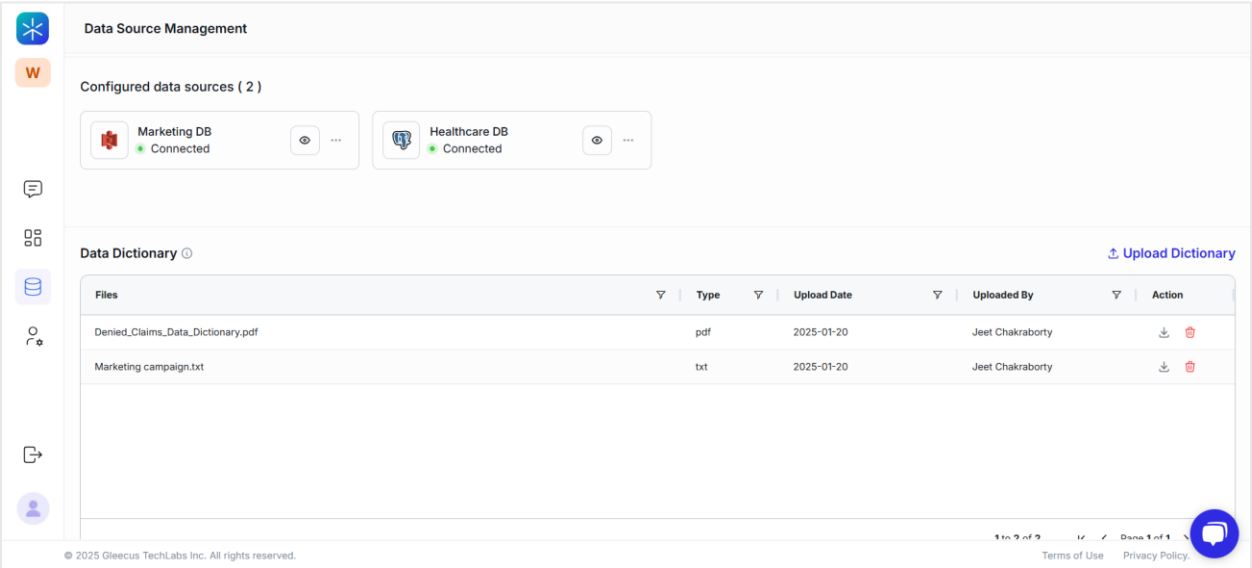
2. Select your file from your system.



3. Once selected, your file will be uploaded, and Lumenn AI will integrate it with your connected data sources.



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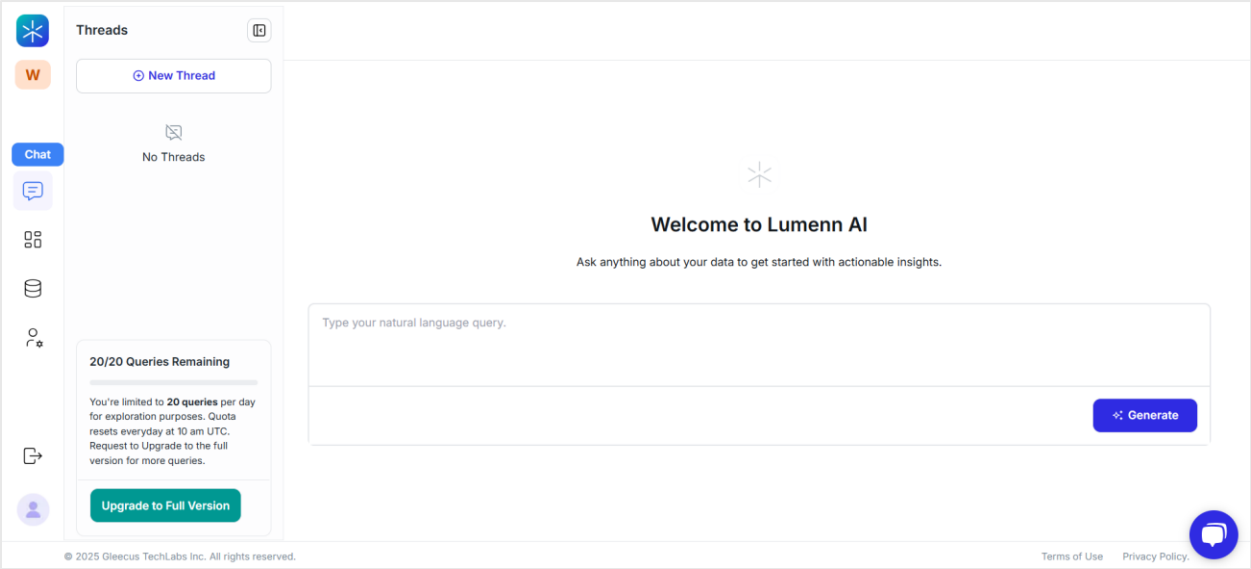
AI Chat Module

Now that your data source setup is complete, you're ready to start querying in Lumenn AI.

Natural Language Query

1. Head to the **Chat Module** from the left-hand navigation panel.



ⓘ In the beta version, you can perform up to **20 queries per day**, and this limit resets daily at **10 AM UTC**. You can track your query usage with the **query limit counter** at the bottom of the threads panel.

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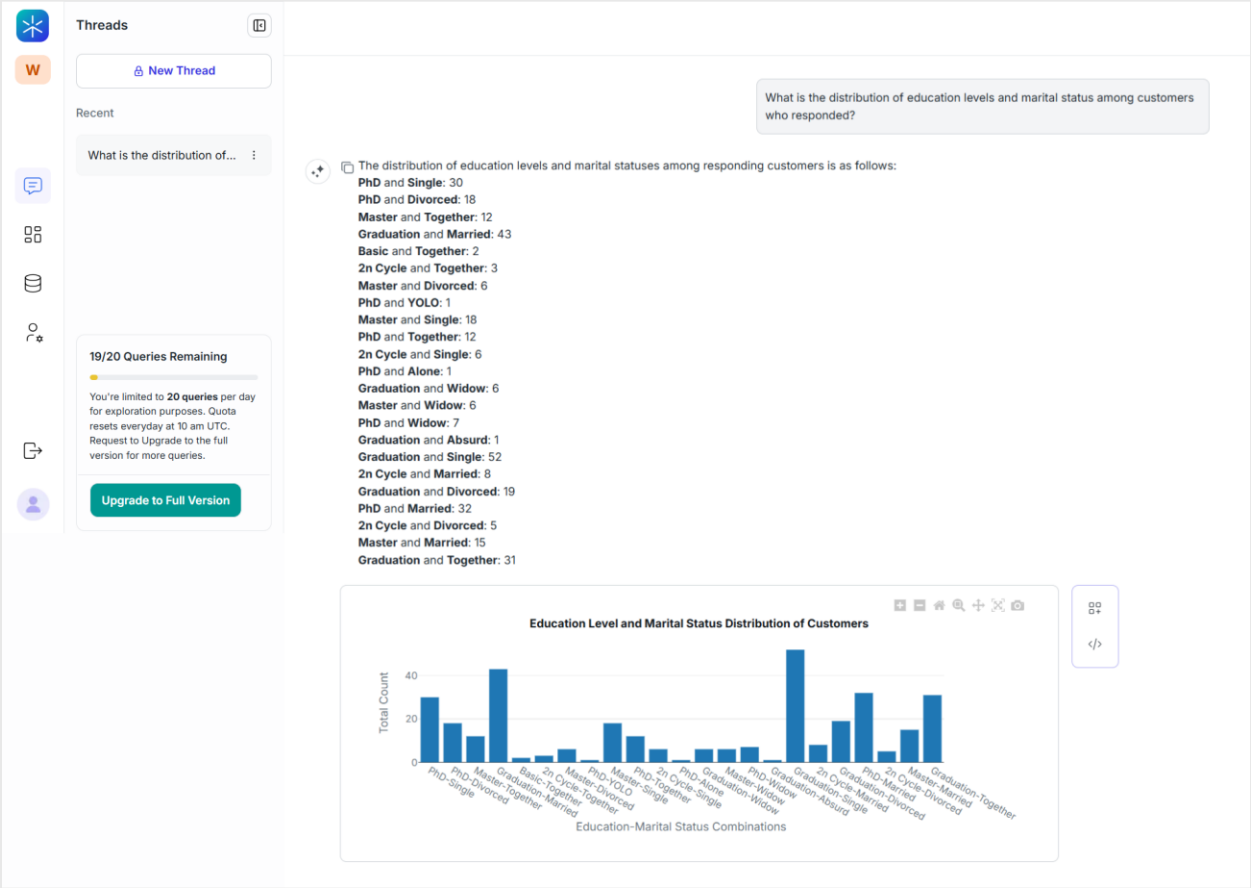
2. Simply type your query, and click **Generate** and Lumenn AI will generate both a **natural language explanation** and a **visualization**. Lumenn figures out the best possible visualization for your query.



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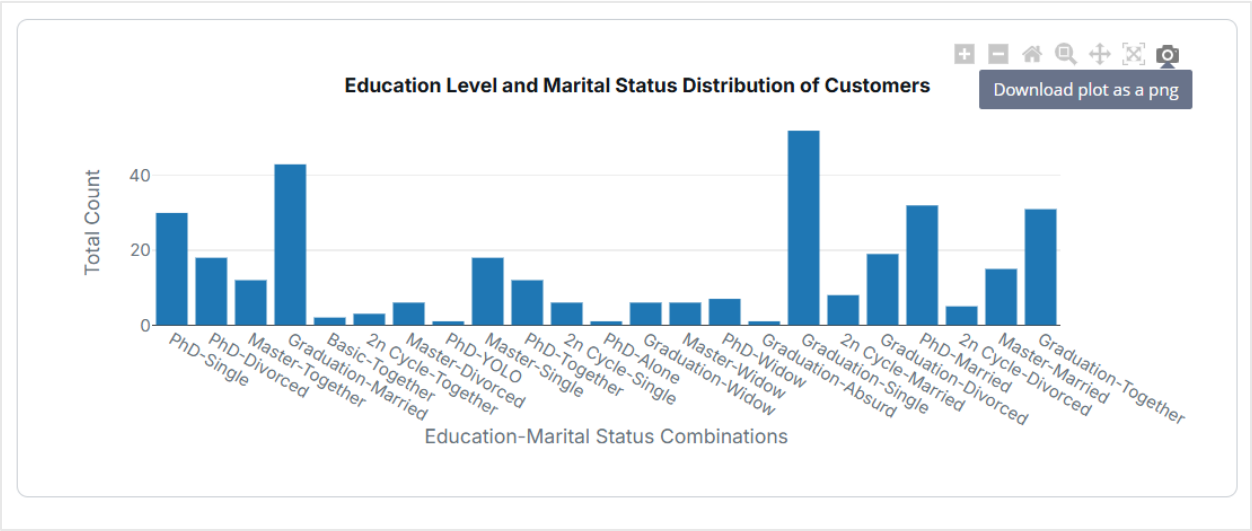
Using Graph Controls

Use the **graph controls** to zoom in, zoom out, or adjust the view as needed. You can also download the visualization as a PNG for sharing or reporting purposes.



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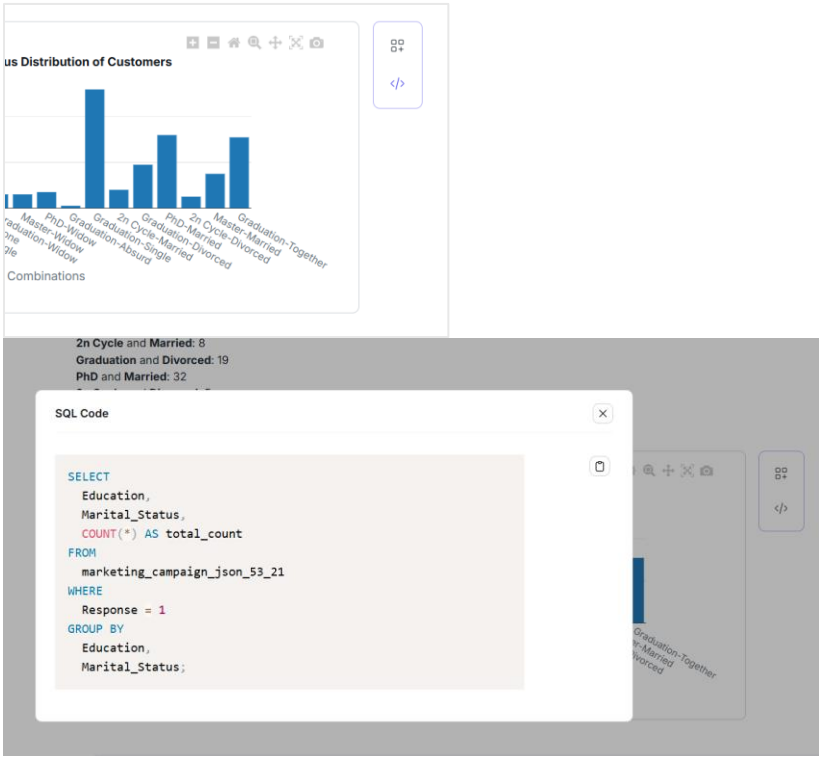
Viewing the SQL response

Click the </> **code icon** to view the **SQL response** for your query, perfect for technical use cases.



Adding a Visualization to Dashboard (Available in Full Version)

In the **full version**, you can directly add visualizations to dashboards by clicking for seamless organization and analysis. You can also send an **upgrade request** directly from here if you'd like to access this feature.

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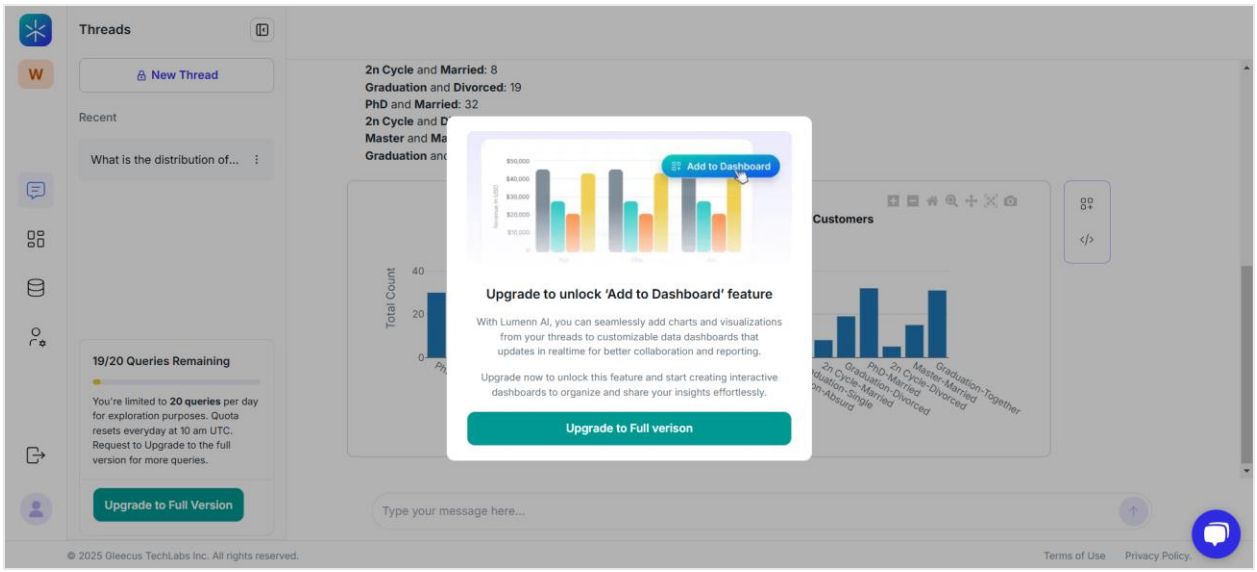

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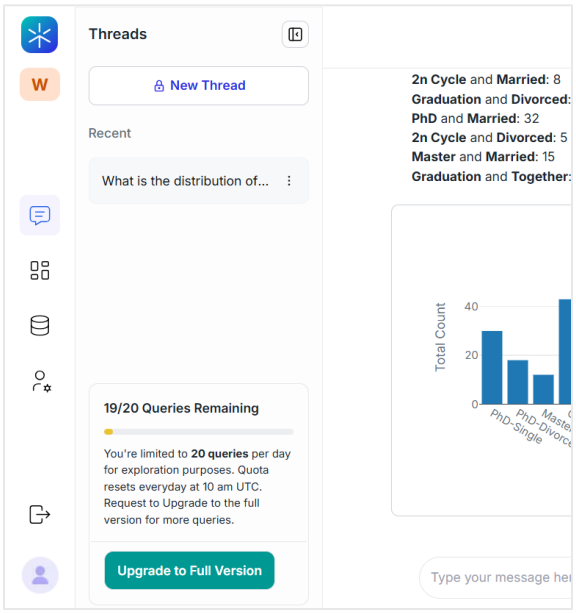
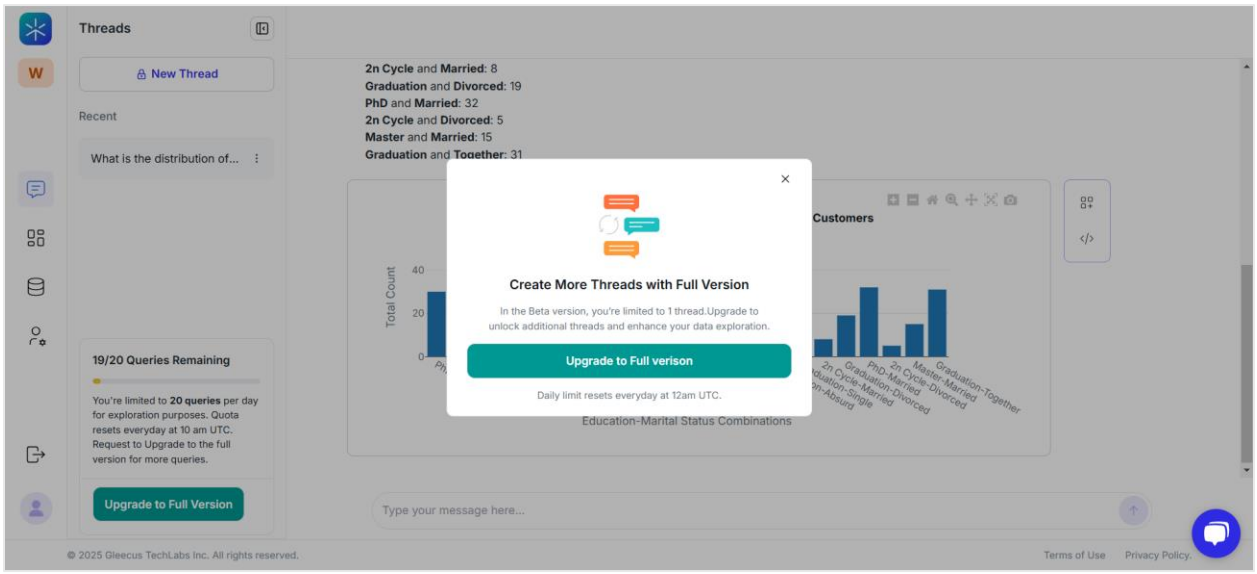
Creating Threads

To stay organized while working with multiple datasets, we recommend creating dedicated **threads** for each topic by clicking **New Thread** button on the threads panel.



In the full version, you'll be able to create **multiple threads** to manage your work efficiently.



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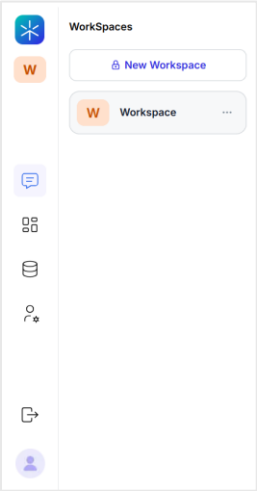
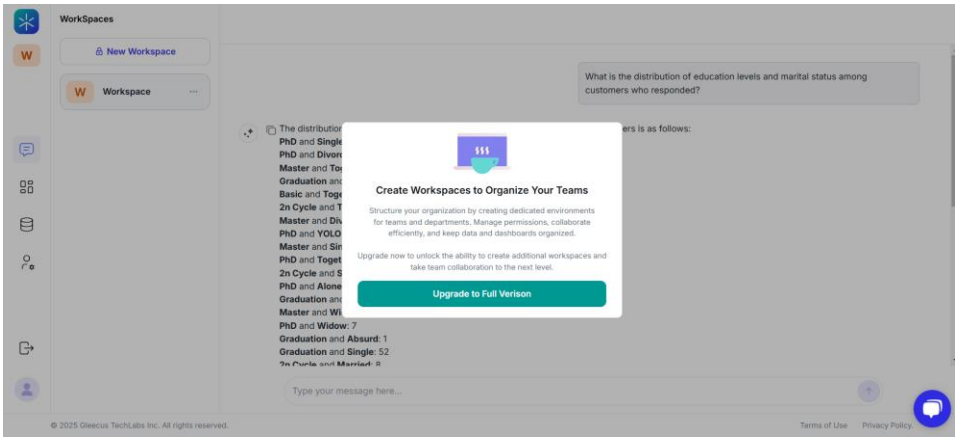
Workspaces

Think of workspaces as departments designed to help you organize your teams and projects efficiently. Each workspace acts as a dedicated space where you can manage connected data sources, dashboards, and team members specific to that group or department.

In the full version, you'll be able to create and manage **multiple workspaces**, making it easy to separate projects across different teams or business units.





ⓘ In the beta version, there's just **one default workspace** available for use.

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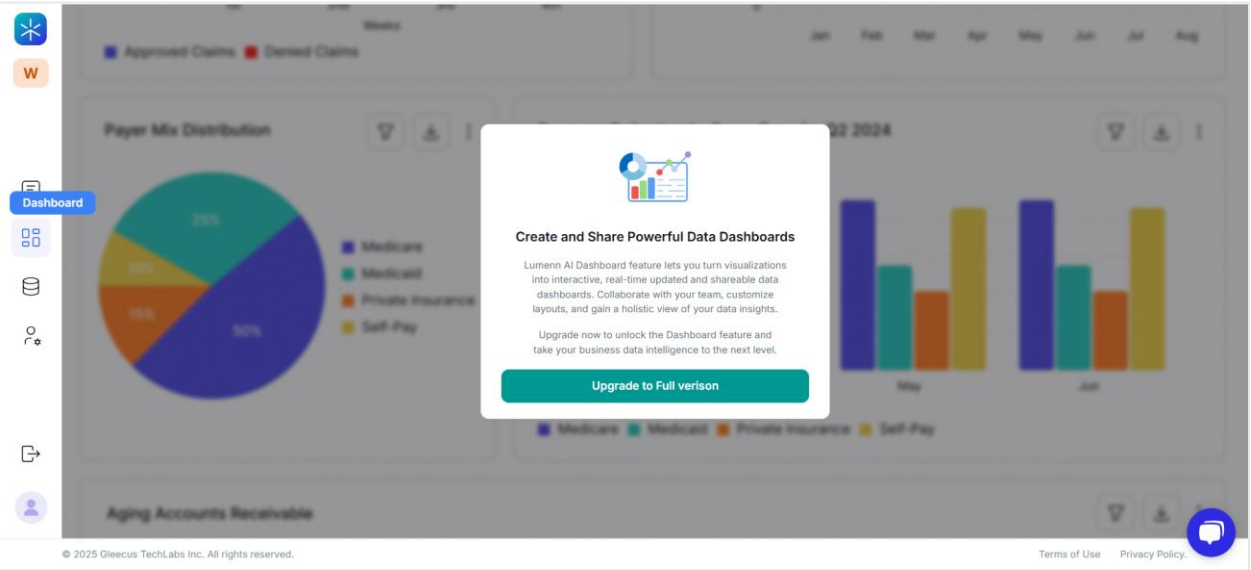
Dashboards

Dashboards are where you can organize and display your most important visualizations and insights in one place, making it easy to track metrics, analyze trends, and collaborate with your team.

This feature is currently only available in the full version of Lumenn AI.

With dashboards, you'll have the ability to add visualizations directly from your queries, customize layouts to fit your needs, and even share dashboards for seamless collaboration across your team.



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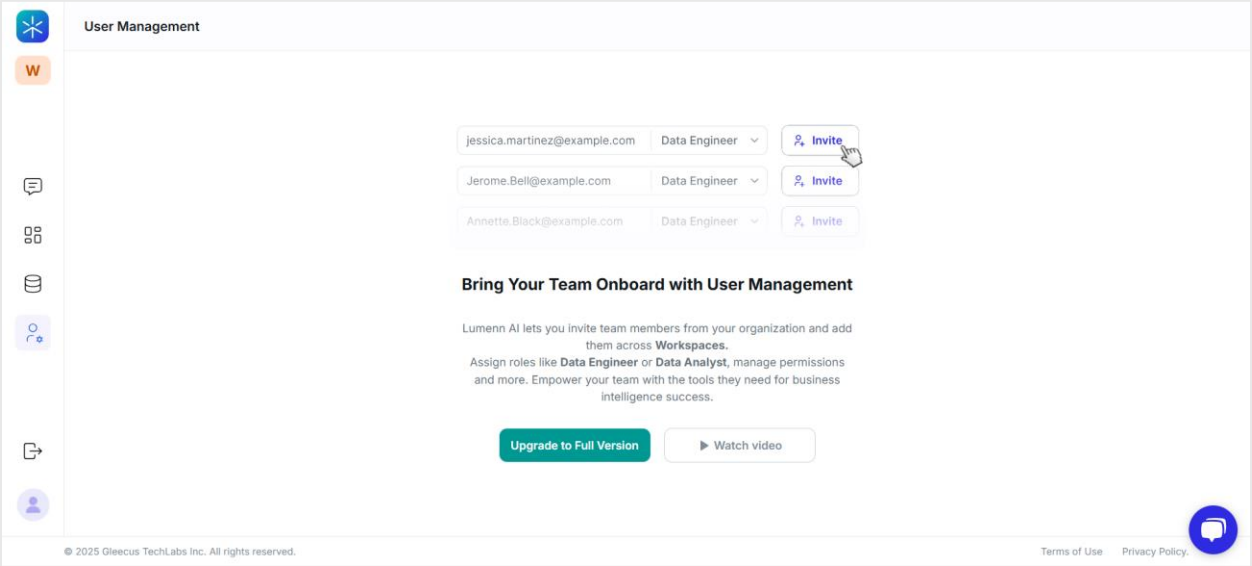
User Management

This feature, available **only in the full version**, allows administrators to invite team members, assign them to specific workspaces, and manage their roles and permissions.

With User Management, you can ensure the right people have access to the right data, fostering collaboration while maintaining security and control.

Admins can easily send out invitation links, monitor active users, and manage access across multiple workspaces.

This functionality is designed to make team collaboration seamless and structured, empowering enterprises to work efficiently across departments.



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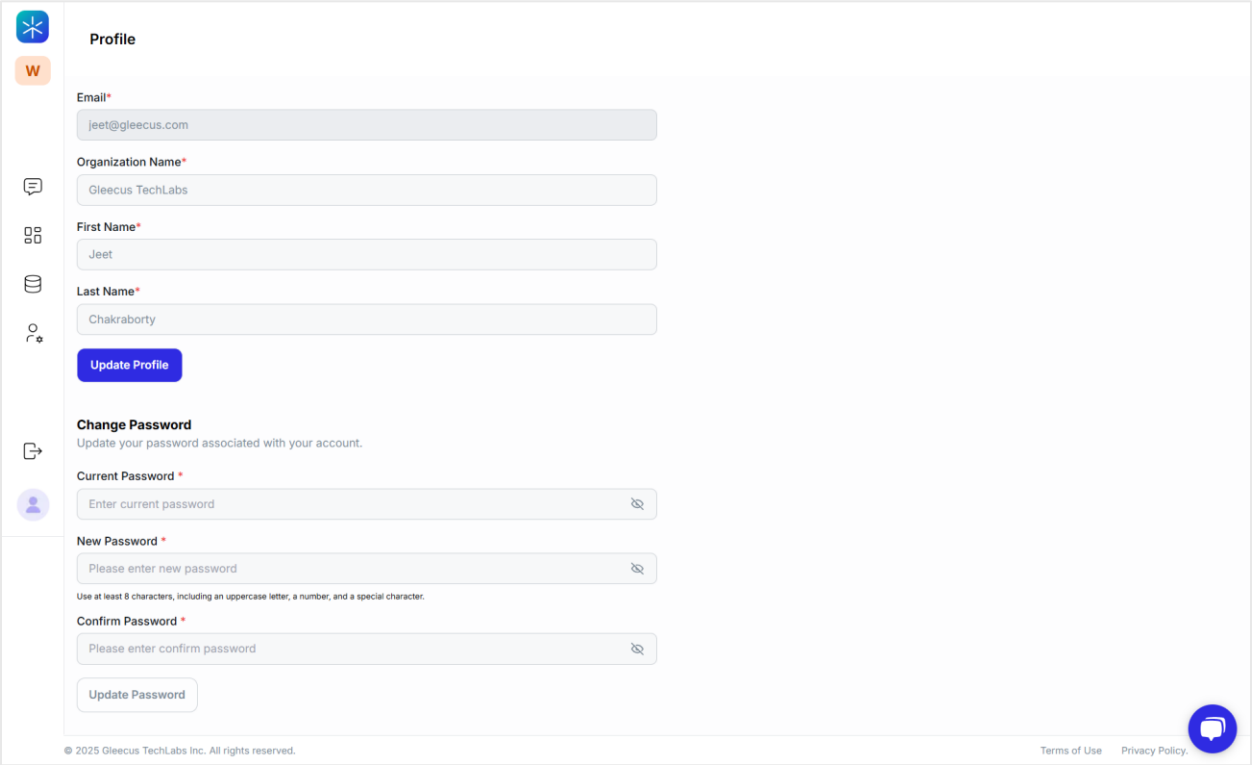
Profile

Here, you can easily **update your personal details**, such as your name or other information.

If you ever need to **update your password**, you can do so directly from the profile section for added convenience and security.

ⓘ Please note that the **email address** associated with your account **cannot be changed**.



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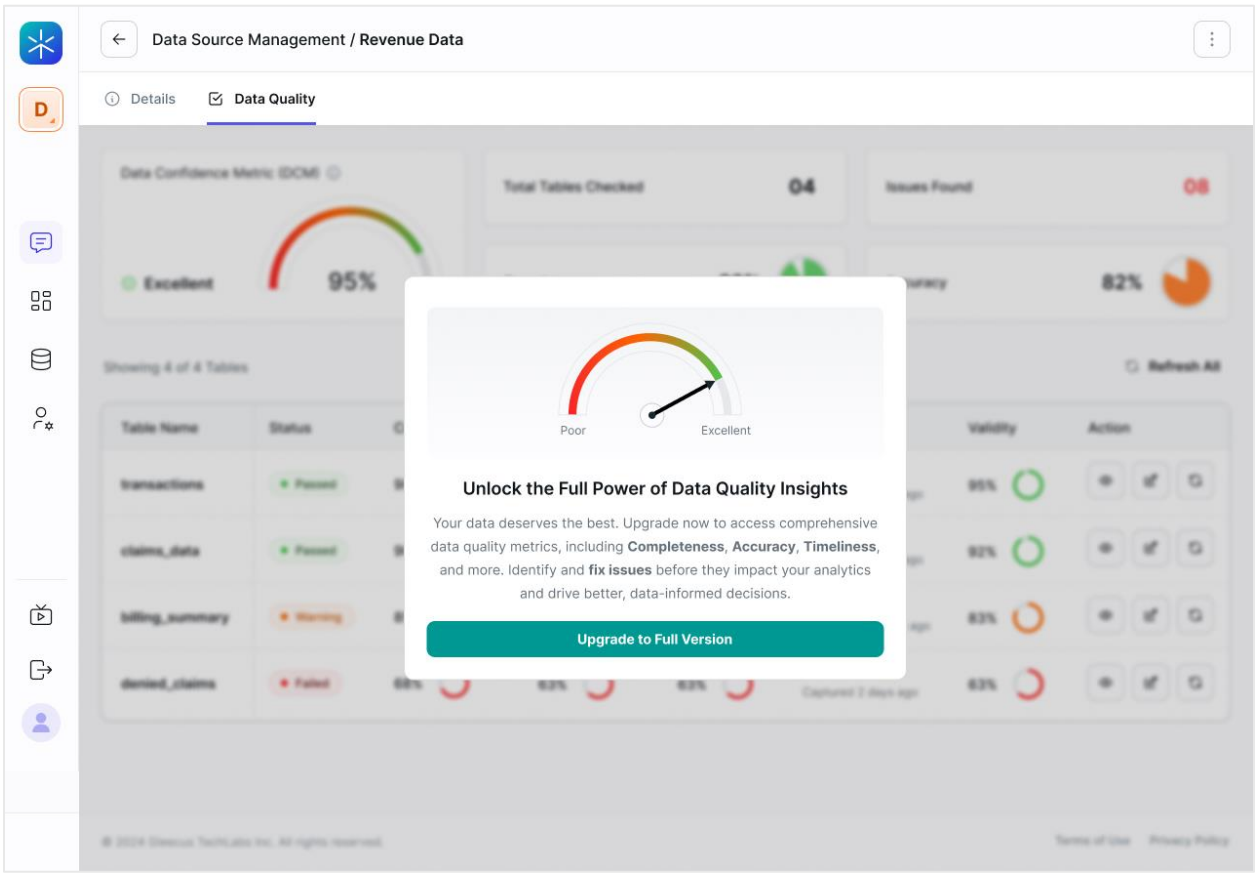
Data Quality

This feature, **available only in the full version**, allows you to ensure the accuracy and reliability of your connected data sources.

By navigating to the **Data Quality tab**, you can run comprehensive data quality checks on your datasets. These checks help identify inconsistencies, missing values, or anomalies, ensuring your analysis is based on clean and trustworthy data.



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Thank you for exploring the Lumenn AI Beta Quick Start Guide!

With Lumenn AI, we aim to simplify and enhance your data analytics experience with **no-code generative BI**, seamless **data source integrations**, and intuitive **natural language querying**.

While the **Beta version** provides a glimpse of what's possible, the **full version** unlocks a suite of powerful features like **dashboards**, **multi-workspaces**, **user management**, and **data quality checks**—all designed to help you get the most out of your data.

We're excited to have you onboard as part of our journey. If you have any questions or need support, feel free to reach out through the help section or contact us directly.

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Contact Support

If you have questions, need assistance, or want to provide feedback, we're here to help. Use the information below to reach us:

Technical Assistance

For technical issues or troubleshooting:

- Support Email: hello@lumenn.ai
- Quick Start Guide Video: https://youtu.be/tVtmKzgBx_w

Sales and Inquiries

- Email: hello@lumenn.ai
- Phone: +1 347-901-4845

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